



Nationwide Advanced Sales Presents: 3Q WebEx Topics

WebEx Schedule of Events, Time: 2:30 p.m. EST

Providing Investment Advice to Participants in Qualified Plans- The New Frontier - July 15

Presented by Rich Landsberg, JD, LLM, CLU, ChFC, RFC, AIF®

This presentation will review the DOL's proposed regulations for financial advisors who want to provide investment advice to participants of qualified plans. In particular we will explore the regulations' methodologies for providing investment advice in a compliant manner.

2+2= It Depends- Determining the Fair Market Value of a Life Insurance Policy - August 12

Presented by Dave Smucker, CPA, CFP®, CLU, ChFC

In the old Whole Life world the cash value of a policy approximated its fair market value. However, we now have universal life, no lapse guarantee universal life, springing cash value, ITR, PERC, and statutory, tax or even California reserves. What's a body to do? This webex will briefly review the confusion surrounding, and the reasons for determining, the fair market value of a life insurance policy.

Cautionary Tales When Exchanging Nonqualified Annuities and Splitting IRA Dollars - September 9

Presented by Tom Duncan, JD, CLU, ChFC

When splitting deferred, nonqualified annuities or IRAs, care should be given to ensure that these transactions are done with the least amount of negative income tax effects. In this presentation we will look at several different splitting scenarios and the cautions that should be taken into consideration when contemplating a partial exchange of a nonqualified deferred annuity and/or a transfer of IRAs.

To listen to the presentation:

Participants Dial-in number: (877) 733-4792

Provide the Event or Host name to join the meeting

To view the presentations go to:

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